Module B:

Issuing
Food Instruments

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Overview

Introduction

This module will help you understand how WIC issues <u>food instruments</u>.

Learning Objectives

After completing this module the Nutrition Assistant will be able to:

- show how to print, verify and distribute food instruments;
- describe the procedure for <u>single, double, and triple issuance</u> of food instruments;
- describe how to <u>void</u> a food instrument;
- describe how to change a <u>food package</u>;
- describe how to maintain <u>checkstock security</u>*; and
- show how to load checkstock, change the printer ribbon, and clear paper jams.

** Words that you may not know are **underlined**. Definitions for these words can be found in the **Glossary** at the end of the module. (Note: Words are only underlined the first few times they appear in the text.)*

How to Issue Food Instruments

Definition

Issuing food instruments is:
- printing food instruments and
- giving them to the participant.

Supplies for Issuing Food Instruments

You will need the following to issue food instruments:
- a box of checkstock that the State WIC Branch has given your local agency,
- an ISIS computer terminal,
- a voucher printer, and
- a *WIC Food Issuance Signature Log.*

Printing & Distributing Food Instruments

The charts on the next 2 pages show you how to:
- print food instruments and
- distribute (give) food instruments.

Learning Activity 1

To learn more about the steps to take to issue food instruments you may want to try **Learning Activity 1** found at the end of this module.

How to Issue Food Instruments (continued)

Printing Food Instruments

1	Setup the printer and the ISIS computer that you will use.
2	Go to the *Logon to Printer* screen in ISIS.
**3	Select the printer you will be using by entering a "c".
**4	Enter the checkstock box number.
**5	Enter the serial number of the first check available in the box.
**6	Load the checkstock in the printer.
7	Again select the printer you will be using by entering an "s".
8	**Verify serial numbers**: Make sure the serial number of the first check you will be printing matches the serial number on the computer screen.
9	Print a test check.
10	**Verify serial numbers**: Again compare serial numbers.
11	Print the food instruments for the family name you want to print.

* *   *These steps are NOT necessary if the checkstock has already been put into the printer.*

How to Issue Food Instruments (continued)

Distributing Food Instruments ***

1. Check identification of participant.
   - Ask for the participant's WIC Authorization Folder (WAF).
   - If the participant has forgotten the WAF, you may accept another form of photo identification.
   - If the participant has lost the WAF, check photo identification and issue another WAF.
   - If the participant has sent an alternate, make sure s/he has the WAF, has signed it, and has photo identification.
   - If the participant has sent a proxy, make sure s/he has the WAF, has a permission slip from the participant, and has photo identification.

2. Check that the food instrument is correct.
   - Make sure printed serial number matches the number on ISIS screen.
   - Make sure participant's name is spelled correctly.
   - Make sure store name is correct.
   - Make sure that all foods listed are correct.

3. Teach participant and alternate how to use the food instruments correctly.
   - Teach **new** participants/alternates how to use the food instruments.
   - Make sure **all** participants/alternates know how to use food instruments.

4. Have participant or alternate sign the *WIC Food Issuance Signature Log.*
   - Make sure participant's name is correctly entered, legibly printed, and matches the name on the food instruments.
   - Have participant or alternate sign the line(s) next to the serial number(s) of the food instruments s/he receives.
   - Compare the signature on the WAF with that on the log.

5. Mail food instruments if the participant does not have an alternate who can pick up the food instruments and the participant:
   - is ill, including hospitalization of the participant after delivery,
   - is caring for an ill family member,
   - does not have access to transportation

   OR the participant:
   - is unable to travel safely due to severe weather or disaster, or
   - is unable to receive food instruments because ISIS is down.

***Note: Your local agency may issue food instruments differently.*

Single, Double, and Triple Issuance of Food Instruments

Frequency of Distribution

A participant may get food instruments for 1, 2 or 3 months depending on her/his category and the local agency's policy.

Single Issuance

Single issuance is printing and giving food instruments so the participant gets 1 food package. This food package gives the participant **1-month supply** of supplemental foods.

Double Issuance

Double issuance is printing and giving food instruments so that the participant gets a food package for the **current month and one for the next month.**

Participants **cannot** use the food instruments for the next month until the "FIRST DAY TO USE" date printed on the food instrument.

Triple Issuance

Triple issuance is printing and giving the participant food instruments so the participant gets food packages for **3 months**. Triple issued food instruments can only be used between the "FIRST DAY TO USE" and "LAST DAY TO USE" dates.

Learning Activity 2

To learn more about how your local agency single, double, and triple issues food instruments you may want to try **Learning Activity 2** found at the end of this module.

Voiding Food Instruments

Definition

Voiding a food instrument is marking it not usable or "VOID".

2 Types of Voids

There are 2 types of voids:
- void without reissue and
- void with reissue.

Void without Reissue

You will use "void without reissue" when you want to void a food instrument, but do not want to reissue it.

You will use this option when food instruments:
- are issued in error,
- are missing or stolen, or
- are returned from other California WIC agencies.

Void with Reissue

You will use "void with reissue" when you want to void a food instrument and also want to reissue it.

You will use this option when:
- food instruments are damaged,
- food instrument serial numbers do not match,
- an individual transfers from one family to another family, or
- a different vendor must be printed on the food instrument.

Voiding Food Instruments (continued)

Voiding Food Instruments	Voiding food instruments includes: • writing "VOID" on the unusable food instrument and • processing the void in ISIS by entering the appropriate reason code.

Void Codes   You will enter a void code in ISIS each time you void a food instrument. The void codes are listed below.

Description of Void	Code
Without Reissue	
Issued in error or no longer wanted	**VN**
Missing or stolen & a police report filed	**VM**
With Reissue	
Damaged or serial numbers do not match	**VD**
Individual transfers into another family	**VF**
Change vendor	**VV**

Storing Voided Food Instruments   Store voided food instruments away from participants.

Learning Activity 3   To learn more about how food instruments are voided at your local agency you may want to try **Learning Activity 3** found at the end of this module.

Changing Issued Food Packages

Changing Food Instruments

Sometimes WIC staff need to change food instruments that have already been issued.

Examples

Some examples of when a food instrument may need to be changed are:

- A woman gets a solely breastfeeding package and later decides to give formula part of the time.

- A participant needs a different formula type.

- A participant wants to change from beans to peanut butter.

- A participant wants to change from regular milk to acidophilus or lactose reduced milk.

How to Change Issued Food Packages

To change issued food packages in ISIS, you will usually go through 2 steps:
1. change prescription and
2. change issued food packages.

Change prescription is only needed when there are more months left in the certification period for which the change applies.

Learning Activity 4

To learn more about how to change issued food packages you may want to try **Learning Activity 4** found at the end of this module.

Maintaining Checkstock Security

Checkstock Security	The checks that make up WIC checkstock are like bank checks.

Your agency is responsible for them and must make sure they do not become lost or stolen. |
| **Physical Security** | Physical security means the safe keeping of WIC checkstock boxes. |
| **Electronic Security** | Electronic security means entering the checkstock into ISIS.

Only authorized WIC staff enter checkstock information (such as box numbers and serial numbers) into ISIS. Check to see who does this at your agency. |
| **How to Maintain Security** | The chart on the next page lists ways to maintain checkstock security.

Each local agency has its own way of maintaining security. Check with your local agency to see how checkstock is handled. |
| **Learning Activity 5** | To learn more about how your agency handles checkstock security you may want to try **Learning Activity 5** found at the end of this module. |

Maintaining Checkstock Security (continued)

How to Maintain Checkstock Security

Receiving Checkstock	• Compare the boxes you receive with the list of boxes on the packing slip. • If there are any mistakes, contact your supervisor and/or the WIC Branch. • (The person who receives checkstock physically will NOT be the same person who receives checkstock electronically.)
Storing Checkstock	• Store checkstock in a secure, locked area. • Limit access to authorized staff only. • Keep a checkstock inventory log.
Transporting Checkstock	• Use containers with locks to move checkstock from main office to different agency sites.
Issuing Food Instruments	• Do not leave checkstock unattended. Keep it away from participants, children and all other unauthorized persons. • At the end of the day or a work session, lock up checkstock and disconnect it in ISIS. • Make sure the person who sends food packages to print is NOT the same person who prints the food instruments.
Recording Voided Food Instruments	• Make sure serial numbers of voided food instruments match serial numbers that appear on the *Daily Voided Food Instruments Report*.

Loading Checkstock, Changing the Printer Ribbon & Clearing Paper Jams

Printer Skills

You will need to know how to use the printer that is used to print food instruments. You will need to know how to:
- load checkstock,
- change the printer ribbon, and
- clear paper jams.

Job Aids

Refer to the Job Aids for detailed descriptions on how to work with your printer.

Learning Activity 6

To learn more about how to use the printer at your local agency you may want to try **Learning Activity 6** found at the end of this module.

Summary

Issuing Food Instruments	Issuing food instruments is: • printing food instruments and • giving them to the participant.
Single, Double, and Triple Issuance of Food Instruments	Food instruments may be single, double or triple issued. Single issuance is issuing food instruments for 1 month; double issuance is issuing food instruments for 2 months; and triple issuance is issuing food instruments for 3 months.
Voiding Food Instruments	Voiding food instruments is marking food instruments not usable and marking them "VOID". There are 2 types of voids: • void without reissue and • void with reissue.
Changing Issued Food Packages	Sometimes a food package needs to be changed. Some examples of when a food instrument may need to be changed are: • A woman gets a solely breastfeeding package and later decides to give formula part of the time. • A participant needs a different formula type. • A participant wants to change from beans to peanut butter. • A participant wants to change from regular milk to acidophilus or lactose reduced milk.

continued on next page

Summary (continued)

**Checkstock
Security**

Check with your local agency to see how checkstock is handled. Some suggestions follow:
- store checkstock in a secure, locked area,
- limit access to authorized staff only,
- keep a checkstock inventory log, and
- use containers with locks to move checkstock from main office to other different agency sites.

Glossary

<u>checkstock security</u>- Checkstock security is the safekeeping of WIC checkstock so that it does not become lost or stolen.

<u>double issuance</u>- Double issuance is printing and giving food instruments so that the participant gets a food package for the current month and one for the next month.

<u>food instrument</u>- A food instrument is a special check given at WIC that is used to buy WIC authorized foods at authorized WIC grocery stores.

<u>food package</u>- A food package is a combination of WIC allowed foods that are given to a participant based on the participant's category, age, and nutritional need.

<u>issuing food instruments</u>- Issuing food instruments is the process of printing food instruments and giving them to the participant.

<u>single issuance</u>- Single issuance is printing and giving food instruments so the participant gets one food package for the current month.

<u>triple issuance</u>- Triple issuance is printing and giving food instruments so the participant gets food packages for 3 months.

<u>void-</u> A food instrument that is void is NOT usable, marked "VOID", and processed in ISIS as not usable.

Progress Check

1. Mark with a check (√) the supplies that you will need to issue food instruments.

    ____ cash register   ____ copy machine

    ____ participant ID   ____ box of checkstock

    ____ computer printer   ____ ISIS computer terminal

    ____ fax machine   ____ WIC Food Issuance Signature Log

2. Number the steps a WIC staff person would go through to print a food instrument when **checkstock is already in the printer**. Order them from 1 to 5.

    _____ go to the *Logon to Printer* screen in ISIS

    _____ check serial numbers of checkstock in printer with numbers on ISIS screen

    _____ select the printer to be used by entering "s" in ISIS

    _____ print a test check and check serial numbers again

    _____ print food instrument for the family name you want

3. List three reasons a WIC staff person might mail food instruments to a participant:

Progress Check (continued)

4. Fill in the blanks with the correct numbers.

A participant who is **single-issued** food instruments receives
_____ packet(s) of food instruments for him/herself and returns in
_____ month(s) for her/his next WIC appointment.

A participant who is **triple-issued** food instruments receives

_____ packet(s) of food instruments for him/herself and returns in

_____ month(s) for her/his next WIC appointment.

5. For each of the types of void situations listed below, mark "R" for void
and reissue and "NR" for void and no reissue.

_____ food instrument was stolen

_____ food instrument issued in error

_____ serial number of food instrument does not match that on
ISIS screen

_____ store name on food instrument needs to be changed

_____ food instrument was damaged

6. Mark with a check (√) when a WIC staff person would change a food
package.

_____ a participant wants peanut butter instead of beans

_____ a breastfeeding participant wants to give her infant formula part
of the time

_____ a participant wants bread added to the food package

_____ a participant wants yogurt instead of milk

Progress Check (continued)

7. Mark the following as "TRUE" or "FALSE".

_____   It is best to transport checkstock in a locked container.

_____   It is not a problem if some of the voided food instruments do NOT appear on the *Daily Voided Food Instruments Report*.

_____   Do not leave checkstock unattended.

_____   Store checkstock in a secure, locked area.

_____   It is important to keep a checkstock inventory log.

Learning Activities

The following activities are included and are recommended for interactive learning:

- Learning Activity 1: Issuing Food Instruments
- Learning Activity 2: Single, Double & Triple Issuance
- Learning Activity 3: Voiding Food Instruments
- Learning Activity 4: Changing Issued Food Instruments
- Learning Activity 5: Checkstock Security
- Learning Activity 6: Using the Printer

Activity 1: Issuing Food Instruments

Learning Objectives   After completing this activity the Nutrition Assistant will be able to:

- show how to print, verify accuracy of, and distribute food instruments.

Instructions

1. Arrange to observe a co-worker issue food instruments to a participant.

2. Use the check off list on the next page to write down your observations.

3. Talk to your mentor or supervisor to discuss your observations.

Activity 1: Issuing Food Instruments

Item (Note: these may vary depending on your agency)	√
Was the printer & computer set up?	
Was the checkstock already in the printer?	
Was the printer selected?	
Was the serial number of the first check entered?	
Were the serial numbers checked for accuracy (Did the numbers on the checkstock match the numbers on the ISIS screen?)	
Was a test check printed? If so, was it voided and recorded on the WIC Food Issuance Signature Log?	
Did the participant or alternate show identification?	
Was the food instrument checked for correctness (Is participant's name spelled correctly? Are the store name and foods correct?)	
Were the correct serial numbers marked off on the WIC Food Issuance Signature Log?	
Did the participant or alternate sign the WIC Food Issuance Signature Log?	
Did staff compare the signature from the WIC Food Issuance Signature Log with that on the WAF?	
Did staff explain how to use the food instruments?	
Comments:	

Activity 2: Single, Double & Triple Issuance

Learning Objectives

After completing this activity the Nutrition Assistant will be able to:

- describe how to single, double, or triple issue food instruments.

Instructions

1. Ask your mentor or supervisor for the written policies your agency has on single, double or triple issuing food instruments.

2. Read over these procedures.

3. Talk with your mentor or supervisor about the procedures.

4. Make sure you understand these procedures.

5. Explain the procedure for single, double and triple issuance to your mentor or supervisor.

Activity 3: Voiding Food Instruments

Learning Objectives   After completing this activity the Nutrition Assistant will be able to:

- void a food instrument.

Background   Voiding a food instrument is making it not usable or "VOID".

There are 2 types of voids:
- void without reissue and
- void with reissue.

Instructions   1. Ask a co-worker to show you how s/he voids a food instrument.

2. Write down your notes on the next pages.

3. Make sure s/he explains how to void a food instrument with reissuance and without reissuance.

4. Discuss your observations with your mentor or supervisor to make sure you understand how to correctly void food instruments.

Activity 3: Voiding Food Instruments

	VOID WITH REISSUE	
Step	*ISIS Screen that Appears*	*What to Do*

	Activity 3: Voiding Food Instruments	
	VOID WITHOUT REISSUE	
Step	*ISIS Screen that Appears*	*What to Do*

Activity 4: Changing Issued Food Packages

Learning Objectives   After completing this activity the Nutrition Assistant will be able to:

- describe how to change an issued food package.

Instructions   1. Ask a co-worker to show you how s/he changes an issued food package.

2. Write down your notes on the next page.

3. Discuss any questions you may have with your co-worker, mentor, or supervisor.

Activity 4: Changing Issued Food Packages

Step	ISIS Screen that Appears	What to Do

Activity 5: Checkstock Security

Learning Objectives   After completing this activity the Nutrition
Assistant will be able to:

- describe how to maintain checkstock
    security.

Instructions

1. Ask your mentor or supervisor to show you
   how your local agency maintains checkstock
   security.

2. Write down your notes on the next page.

3. Discuss any questions you may have with your
   mentor or supervisor.

Activity 5: Checkstock Security

Notes:

Receiving Checkstock:

Storing Checkstock:

Transporting Checkstock:

Additional Notes:

Activity 6: Using the Printer

Learning Objectives   After completing this activity the Nutrition Assistant will be able to:
- load food instrument check paper,
- change the printer ribbon, and
- clear paper jams.

Instructions

1. Ask your mentor or supervisor for a copy of the *ISIS Job Aids.*

2. Review the sections that explain how to load paper, change the printer ribbon, and clear paper jams.

3. Ask a co-worker, your mentor or supervisor to show you how to load paper, change the printer ribbon, and clear paper jams.

4. Now, ask your co-worker, mentor, or supervisor to watch you as you load paper, change the printer ribbon, and clear paper jams. Do this several times until you feel comfortable using the printer.

Progress Check

1. Mark with a check (√) the supplies that you will need to issue food instruments.

    _____ cash register   _____ copy machine

    _√_ participant ID   _√_ box of checkstock

    _√_ computer printer   _√_ ISIS computer terminal

    _____ fax machine   _√_ WIC Food Issuance Signature Log

2. Number the steps a WIC staff person would go through to print a food instrument when **checkstock is already in the printer**. Order them from 1 to 5.

    _**1**_ go to the *Logon to Printer* screen in ISIS

    _**3**_ check serial numbers of checkstock in printer with numbers on ISIS screen

    _**2**_ select the printer to be used by entering "s" in ISIS

    _**4**_ print a test check and check serial numbers again

    _**5**_ print food instrument for the family name you want

3. List three reasons a WIC staff person might mail food instruments to a participant:
   Answers might include any 3 of the following:
   - ***Participant is ill/hospitalized and cannot come to clinic & does not have an alternate;***
   - ***Participant or alternate do not have access to transportation;***
   - ***ISIS is down; or***
   - ***Bad weather makes it hard for the participant to travel.***

Progress Check (continued)

4. Fill in the blanks with the correct numbers.

   A participant who is **single-issued** food instruments receives
   __1__ packet(s) of food instruments for him/herself and returns in
   __1__ month(s) for her/his next WIC appointment.

   A participant who is **triple-issued** food instruments receives

   __3__ packet(s) of food instruments for him/herself and returns in

   __3__ month(s) for her/his next WIC appointment.

5. For each of the types of void situations listed below, mark "R" for void
   and reissue and "NR" for void and no reissue.

   _NR_   food instrument was stolen

   _NR_   food instrument issued in error

   _R_   serial number of food instrument does not match that on
               ISIS screen

   _R_   store name on food instrument needs to be changed

   _R_   food instrument was damaged

6. Mark with a check (√) when a WIC staff person would change a food
   package.

   _√_   a participant wants peanut butter instead of beans

   _√_   a breastfeeding participant wants to give her infant formula part
         of the time

   ____   a participant wants bread added to the food package

   ____   a participant wants yogurt instead of milk

Progress Check (continued)

7. Mark the following as "TRUE" or "FALSE".

    TRUE   It is best to transport checkstock in a locked container.

    FALSE   It is not a problem if some of the voided food instruments do not appear on the *Daily Voided Food Instruments Report*.

    TRUE   Do not leave checkstock unattended.

    TRUE   Store checkstock in a secure, locked area.

    TRUE   It is important to keep a checkstock inventory log.